Alberta Tourism Market Monitor 2014 Edition

Indicators point to positive growth for tourism in 2014

The majority of tourism indicators tracked in 2014 showed positive growth at various levels, which suggests that 2014 was a good year for the tourism industry in Alberta.

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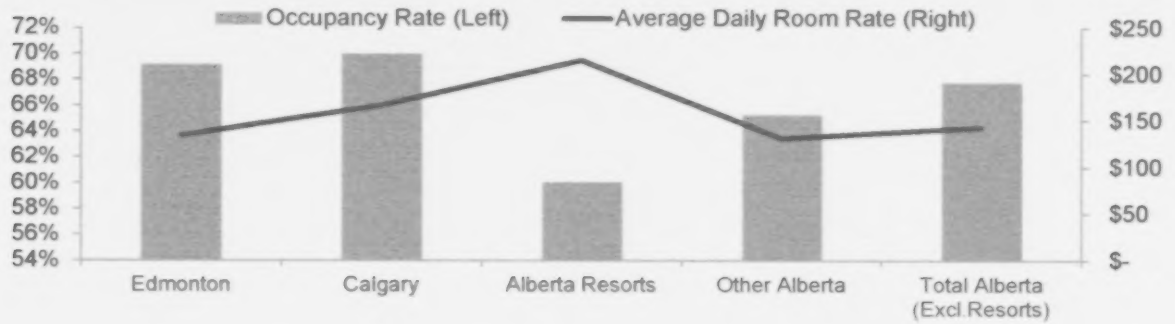
Park visitor attendance at the three National Parks tracked (Banff, Jasper and Waterton National Parks) experienced impressive growth in 2014: Banff National Park welcomed more than 3.5 million visitors (including group tours), representing a 7.9% increase from 2013. Jasper National Park followed with more than 2.1 million visitors, an increase of 6.5% from 2013, while Waterton Lakes National Park recorded 413,600 visitors, an increase of 1.3% over 2013. Air traffic volumes in the province also showed strong growth in 2014. Calgary International Airport recorded passenger traffic of more than 15 million travellers, a 6.6% jump 2013. Edmonton International Airport saw a 5.0% increase in passenger traffic compared to 2013, with more than 7 million enplane- and deplanements. Edmonton International Airport registered a 13.1% increase in international passenger traffic (459,300 enplane- and deplanements) in 2014, which could in part be attributed to the introduction of the Icelandair flight between Edmonton and Reykjavik.

The occupancy rate for Total Alberta (excluding resorts) in 2014 was 67.8%, while it totalled 64.3% for the whole of Canada. The average daily room rate for Total Alberta (excluding resorts) in this period was $142.98, compared to $138.28 nationally.

Calgary's occupancy rate in 2014 remained below that of 2013, which can be attributed to stable demand and a 4.8% increase in room supply in 2014. Hotel room growth of 20% is projected for Calgary by 2016, which could inhibit increases in the occupancy rate for the city in 2015 and 2016 as well, if the demand for hotel rooms does not keep up with increased supply.

Selected Accommodation Indices in 2014



Alberta Government

2014 Alberta Tourism Market Monitor

Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2014 (000's of enplanements and deplanements) [1]													
Edmonton International Total	583.9	567.4	624.8	619.7	597.7	593.2	666.9	708.8	591.5	597.7	566.1	614.8	7,332.5
Per cent change from 2013	5.8%	4.8%	5.0%	8.3%	4.2%	6.5%	5.9%	6.9%	6.1%	5.2%	1.3%	0.1%	5.0%
Domestic	409.1	392.3	427.1	439.4	459.9	478.1	536.2	572.1	479.0	466.3	405.2	436.0	5,500.6
Per cent change from 2013	5.1%	4.3%	2.9%	6.6%	2.3%	3.8%	3.1%	4.8%	5.5%	4.7%	3.9%	-0.7%	3.5%
Transborder	118.6	123.5	140.1	131.0	109.2	91.8	104.0	107.8	91.1	111.3	119.5	124.8	1,373
Per cent change from 2013	6.4%	6.0%	12.4%	14.0%	10.6%	15.9%	15.1%	10.7%	4.6%	1.8%	5.8%	1.9%	8.5%
International	56.2	51.7	57.6	49.3	28.6	23.3	26.7	28.8	21.4	20.1	41.4	54.0	459.3
Per cent change from 2013	10.5%	5.4%	4.1%	9.0%	12.8%	34.4%	38.3%	44.7%	28.6%	45.3%	2.8%	2.0%	13.1%
Calgary International Total	1,172.0	1,153.2	1,248.1	1,255.1	1,225.5	1,264.8	1,445.6	1,529.7	1,262.3	1,276.1	1,164.4	1,262.9	15,261.1
Per cent change from 2013	7.3%	9.4%	5.1%	9.7%	6.5%	8.9%	6.3%	6.3%	5.9%	5.7%	4.3%	4.3%	6.6%
Domestic	791.5	771.6	821.1	869.3	868.1	915.3	1,051.6	1,118.2	913.2	929.6	820.0	875.4	10,745.0
Per cent change from 2013	6.4%	9.1%	4.4%	10.5%	5.9%	9.3%	7.0%	7.7%	6.5%	5.8%	3.7%	4.1%	6.7%
Transborder	250.1	260.5	291.4	269.0	249.0	236.7	274.3	282.3	242.3	257.1	233.4	259.0	3,106.0
Per cent change from 2013	8.7%	9.7%	8.3%	9.5%	7.9%	8.5%	5.0%	1.2%	4.0%	6.3%	3.6%	4.0%	6.4%
International	130.5	121.1	135.6	116.8	108.5	112.8	119.6	129.2	106.8	89.3	111.0	128.5	1,410.1
Per cent change from 2013	10.1%	10.5%	2.3%	4.1%	7.7%	6.9%	3.3%	6.1%	6.8%	2.7%	10.8%	6.2%	6.4%
Highway Count 2014 (000's of vehicles) [2]													
Hwy 1 -Sask border w-bound	55.9	56.0	62.3	71.5	77.3	83.6	104	110.5	79.2	81.7	64.4	72.2	918.6
Per cent change from 2013	1.1%	0.0%	-2.2%	9.2%	-1.7%	8.2%	0.9%	1.7%	-1.6%	1.6%	-2.3%	8.7%	1.9%
Hwy 1 - Banff Pk Gate (2-way)	473	449.1	499.1	532.4	586.2	659.8	881.7	982.6	645.7	563.7	408.5	529.7	7,211.50
Per cent change from 2013	3.4%	-4.9%	-6.8%	15.8%	1.1%	44.1%	12.7%	4.8%	-1.3%	8.0%	1.2%	11.6%	7.0%
Hwy 16 - Jasper Pk Gate (2 way)	91.8	84.7	105.2	124.6	139.5	162.0	224.4	264.8	154.4	125.3	83.6	108.4	1668.7
Per cent change from 2013	2.1%	-2.0%	-6.8%	16.1%	2.3%	-8.1%	5.3%	7.1%	-1.0%	5.8%	3.2%	15.3%	3.1%
Hwy 16 - Jct #897 w-bound	169.6	157.6	182.7	187.5	200.7	200.0	219.9	223.3	202.5	210.4	178.4	180.3	2312.9
Per cent change from 2013	2.8%	-1.6%	3.7%	4.8%	0.2%	0.7%	2.3%	0.8%	0.3%	1.6%	-0.9%	7.3%	1.8%
National Park Attendance (000's of person visits) 2014 [3] Includes Group Tours for Banff and Jasper National Parks.													
Banff	171.0	164.6	184.1	231.3	258.3	300.0	560.9	633	397.9	140.6	103.5	141.7	3,552.1
Per cent change from 2013	3.6%	2.9%	-7.2%	19.8%	2.0%	41.9%	9.5%	4.8%	2.3%	8.9%	2.1%	13.1%	7.9%
Jasper	49.8	48.3	59.7	142.1	161.5	190.3	393.6	453.9	275.7	60.1	39.7	53.8	2,154.6
Per cent change from 2013	3.7%	-1.8%	-7.3%	17.6%	2.0%	9.1%	7.1%	5.6%	1.5%	6.2%	2.2%	15.0%	6.5%
Waterton Lakes	6.5	6.3	6.3	11.0	30.9	59.8	102.5	106.8	53.2	18.4	5.4	6.5	413.6
Per cent change from 2013	1.6%	-17.1%	-27.6%	17.0%	1.3%	-2.0%	8.6%	3.2%	-6.7%	7.0%	-17.7%	8.3%	1.3%
Employment (000's of persons) 2014 Seasonally Adjusted [4]													
Accommodation and Food Services	149.2	148.9	148.5	148.9	149.2	132.3	134.1	131.8	143.3	153.8	154.3	153.4	145.6
Per cent change from 2013	15.5%	14.9%	24.1%	18.0%	13.5%	-0.6%	-0.6%	-5.1%	-1.1%	5.8%	4.5%	3.0%	7.7%

Sources: Edmonton International Airport, Calgary International Airport, Alberta Transportation, Parks Canada, Statistics Canada.

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Accommodation Indices 2014 [5]													
Edmonton Occupancy Rate	58.3%	68.2%	74.1%	74.8%	72.9%	69.7%	64.8%	76.3%	70.8%	72.4%	73.5%	54.1%	69.2%
Point change from 2013	3.5	-2.1	-0.2	-1.1	0.7	-3.8	-0.2	4.7	-3.6	-1.7	-2.1	-1.7	-0.6
Average Daily Room Rate	$129.90	$133.50	$135.81	$135.34	$135.51	$136.02	$127.73	$133.28	$136.87	$136.22	$138.41	$130.12	$133.90
Calgary Occupancy Rate	57.9%	63.3%	67.6%	71.3%	71.2%	76.4%	77.7%	79.3%	79.6%	73.6%	66.7%	53.6%	70.0%
Point change from 2013	-1.8	-3.3	-2.2	-4.4	-3.4	1.1	-4.5	-1.1	-0.9	-3.5	-8.1	-1.9	-2.9
Average Daily Room Rate	$157.27	$161.74	$160.21	$164.21	$163.50	$184.30	$190.01	$150.26	$170.95	$171.78	$166.03	$153.34	$166.67
Alberta Resorts Occupancy Rate	38.0%	45.6%	45.1%	46.1%	61.0%	75.9%	87.9%	91.8%	80.6%	54.5%	41.8%	49.6%	60.1%
Point change from 2013	1.0	1.1	-7.7	3.8	5.6	11.1	9.4	4.7	2.9	2.9	0.6	1.3	3.0
Average Daily Room Rate	$165.86	$175.65	$167.05	$163.06	$188.85	$241.20	$265.38	$271.53	$231.32	$178.21	$164.72	$221.21	$214.70
Other Alberta* Occupancy Rate	59.9%	66.4%	67.9%	59.2%	64.4%	67.1%	68.7%	71.0%	71.7%	70.2%	66.7%	49.4%	65.3%
Point change from 2013	3.6	2.7	3.9	1.4	5.9	3.2	-1.8	0.9	0.8	0.3	-1.9	-2.2	1.5
Average Daily Room Rate	$128.41	$129.89	$129.71	$127.41	$127.96	$130.42	$130.13	$130.84	$132.67	$133.10	$132.00	$131.54	$130.93
Total Alberta (excl. Resorts) Occupancy Rate	58.8%	65.9%	69.5%	67.2%	68.8%	70.6%	70.3%	75.0%	73.8%	71.9%	68.6%	52.0%	67.8%
Point change from 2013	2.0	-0.6	0.8	-1.2	1.6	0.6	-2.1	1.5	-0.9	-1.3	-3.8	-1.9	-0.4
Average Daily Room Rate	$137.42	$140.16	$140.38	$142.06	$141.46	$149.38	$149.08	$137.75	$146.20	$146.18	$143.88	$137.95	$142.98
Food Services and Drinking Places 2014 ($ Millions) unadjusted [6]													
Total Receipts for Alberta	$648.70	$628.30	$715.30	$713.90	$758.30	$745.00	$759.10	$768.10	$736.00	$765.70	$727.40	$744.00	$725.80
Per cent change from 2013	5.3%	2.7%	5.2%	8.2%	8.1%	6.4%	5.9%	6.8%	5.1%	6.9%	3.8%	7.0%	6.0%
Historic Sites and Museums 2014 (000's of person visits) [7]													
Visitor Attendance	23.5	39.8	38.5	47.5	77.5	115.5	160.5	188.9	59.4	40.1	24.7	20.3	836.2
Per cent change from 2013	10.9%	-6.8%	-9.7%	11.4%	3.8%	14.3%	1.3%	4.4%	-14.3%	-0.2%	-0.4%	16.0%	2.5%
Sources: Statistics Canada, PKF Consulting Inc, Alberta Culture													

*Other Alberta includes Lethbridge, Red Deer, and other Alberta communities

1-Jun-15

Alberta Tourism Market Monitor: 2011 - 2014 Annual Data

Alberta Culture and Tourism

	2011	2012	2013	2014
Air Passengers (000's of enplanements and deplanements) [1]				
Edmonton International Total	6,277.1	6,676.4	6,983.2	7,332.5
Per cent change from previous year	3.1%	6.4%	4.6%	5.0%
Domestic	-	5,109.6	5,312.2	5,500.6
Per cent change from previous year	-	6.1%	4.0%	3.5%
Transborder	-	1,173.9	1,264.8	1,372.7
Per cent change from previous year	-	8.1%	7.7%	8.5%
International	-	392.9	406.2	459.3
Per cent change from previous year	-	4.1%	3.4%	13.1%
Calgary International Total	12,771	13,641.2	14,316.1	15,261.1
Per cent change from previous year	1.1%	6.0%	5.0%	6.6%
Domestic	-	9,577.7	10,069.9	10,745.0
Per cent change from previous year	-	6.2%	5.1%	6.7%
Transborder	-	2,725.4	2,920.3	3,106.0
Per cent change from previous year	-	7.9%	7.0%	6.4%
International	-	1,335.0	1,325.8	1,410.1
Per cent change from previous year	-	1.4%	-0.7%	6.4%
Highway Count (000's of vehicles) [2]				
Hwy 1 -Sask border w-bound	891.7	908.7	901.4	918.6
Per cent change from previous year	-0.1%	1.9%	-0.8%	1.9%
Hwy 1 - Banff Pk Gate (2-way)	6307.7	6605.9	6736.6	7211.5
Per cent change from previous year	0.6%	4.7%	2.0%	7.0%
Hwy 16 - Jasper Pk Gate (2 way)	1529.4	1559.6	1618.9	1668.7
Per cent change from previous year	2.8%	2.0%	3.8%	3.1%
Hwy 16 - Jct #897 w-bound	2149.9	2252.8	2272.6	2312.9
Per cent change from previous year	6.0%	4.8%	0.9%	1.8%
National Park Attendance (000's of person visits) [3] Includes Group Tours for Banff and Jasper National Parks.				
Banff	3,179.3	3,286.8	3,291.9	3,552.1
Per cent change from previous year	-0.2%	3.4%	0.2%	7.9%
Jasper	1,940.5	1,991.4	2,022.8	2,154.6
Per cent change from previous year	0.8%	2.6%	1.6%	6.5%
Waterton Lakes	397.5	401.3	408.3	413.6
Per cent change from previous year	-1.0%	1.0%	1.7%	1.3%
Employment (000's of persons) Seasonally Adjusted [4]				
Accommodation and Food Services	131.2	133.3	135.6	145.6
Per cent change from previous year	4.9%	1.8%	1.4%	7.7%
Sources: Edmonton International Airport, Calgary International Airport, Alberta Transportation, Parks Canada, Statistics Canada.				

	2011	2012	2013	2014
Accommodation Indices [5]				
Edmonton Occupancy Rate	62.4%	66.5%	69.7%	69.2%
Point change from previous year	0.7	4.1	3.2	-0.6
Average Daily Room Rate	$118.89	$122.42	$127.48	$133.90
Calgary Occupancy Rate	66.8%	70.5%	72.7%	70.0%
Point change from previous year	2.8	3.8	1.9	-2.9
Average Daily Room Rate	$145.48	$156.04	$162.23	$166.67
Alberta Resorts Occupancy Rate	54.0%	56.4%	57.1%	60.1%
Point change from previous year	1.7	2.4	0.8	3.0
Average Daily Room Rate	$187.40	$196.10	$202.63	$214.70
Other Alberta* Occupancy Rate	58.7%	61.5%	64.0%	65.3%
Point change from previous year	7.0	2.7	2.5	1.5
Average Daily Room Rate	$114.40	$120.79	$125.41	$130.93
Total Alberta (excl. Resorts) Occupancy Rate	62.3%	65.6%	68.2%	67.8%
Point change from previous year	3.9	3.4	2.4	-0.4
Average Daily Room Rate	$125.84	$132.24	$137.59	$142.98
Food Services and Drinking Places ($ Millions) unadjusted [6]				
Total Receipts for Alberta	$595.13	$638.52	$684.90	$725.80
Per cent change from previous year	7.0%	7.5%	7.3%	6.0%
Historic Sites and Museums (000's of person visits) [7]				
Visitor Attendance	773.1	828.5	816.0	836.2
Per cent change from previous year	-11.5%	7.2%	-1.5%	2.5%
Sources: Statistics Canada, PKF Consulting Inc, Alberta Culture				

Other Alberta includes Lethbridge, Red Deer, and other Alberta communities

1-Jun-15

Definitions of Indicators

1. Air Passengers - Numbers are preliminary estimates of the number of air passengers enplaning and deplaning at the Edmonton International and Calgary International Airports.

Source: Edmonton International Airport and Calgary International Airport Websites.

2. Highway Traffic - These data are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders counts all vehicles by direction. Year-to-date is a cumulative total for all vehicles.

Source: Alberta Transportation's Automatic Traffic Recorders (ATR).

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.

Beginning in 2004 the monthly figures for Banff National Park and Jasper National Park reflect independent travellers only, and do not include people travelling as part of a tour group. The tour group data, however, are included in the annual edition of the Monthly Market Monitor.

Source: Parks Canada.

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay or profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.

Source: Statistics Canada, Labour Force Survey.

5. Accommodation Indices - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.

Other Alberta includes Lethbridge, Red Deer, and other Alberta communities.

Source: PKF Consulting Inc. with reproduction and use of information subject to PKF Disclaimer and Restrictions as detailed at www.pkfcanada.com

6. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the 3 digit NAICS level of 722, which includes: Full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.

Source: Statistics Canada, Food Services and Drinking Places.

7. Historic Sites and Museums - Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Alberta Museum, the Royal Tyrrell Museum of Paleontology, and the Tyrrell Field Station.

Source: Alberta Culture

01-June-15